NIH
X-Train ver 2 Use Case Survey

Document Version 1.4

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Revision History

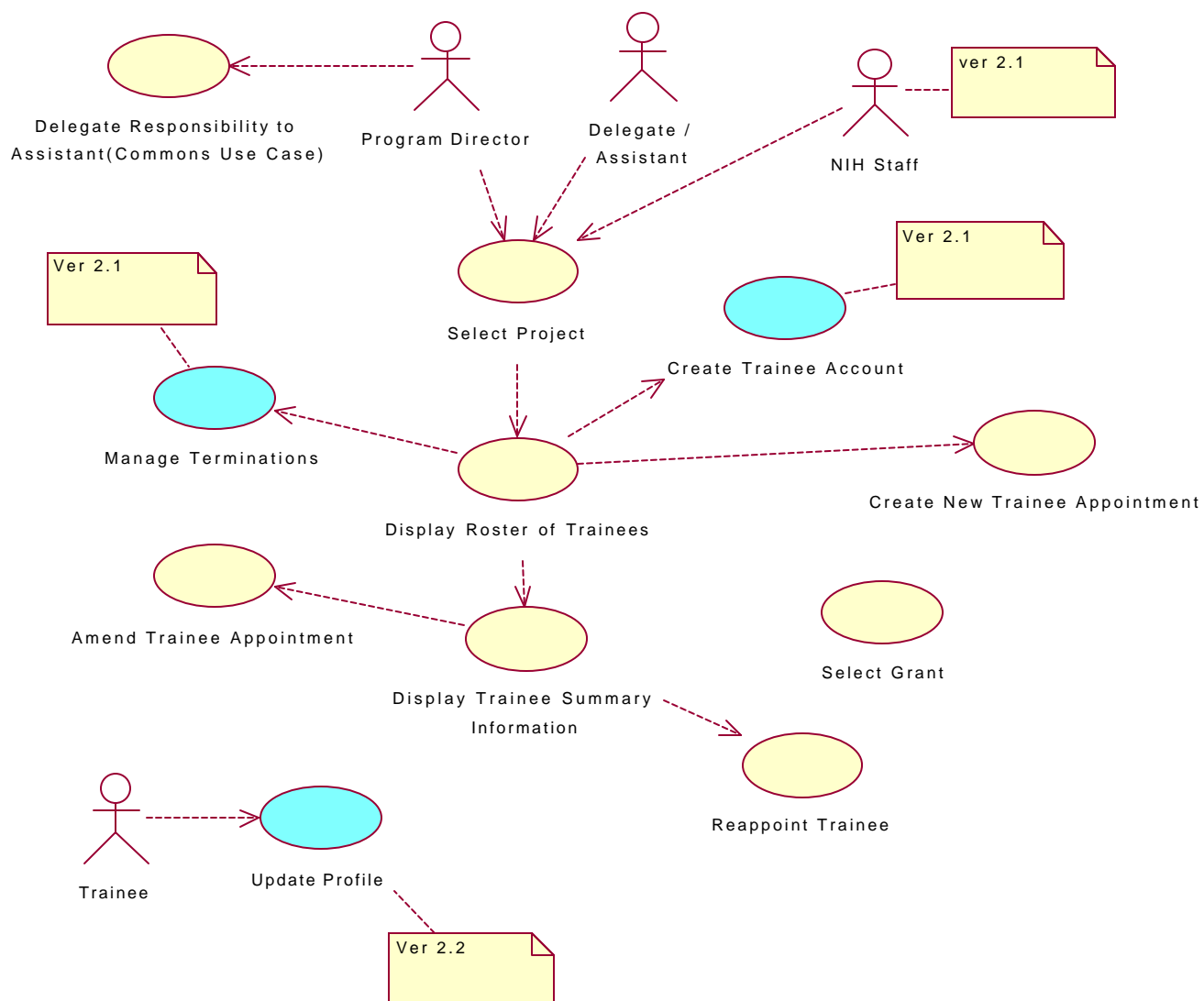| Date	Version	Description	Author
February 14, 2003	1.0	Initial Version	Steve Fitzgerald
March 13, 2003	1.1	Added delegation reference	Steve Fitzgerald
March 27, 2003	1.2	Added Display Trainee Summary UC, changed roster description to include previous appointments.	Steve Fitzgerald
April 1, 2003	1.3	Added ability to print payback agreement forms when trainee account is created. (Ver 2.1 requirement). Changed create termination notice use case to manage terminations for vers 2.1 so it was consistent with diagram. Change delegation names so they were consistent.	Steve Fitzgerald
April 6, 2003	1.4	Added Select Project Use Case. Modify definition of select grant use case. Modified Diagram	Steve Fitzgerald

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Use Case Listing

1) Select Project

Actors:

Program Director, delegate, NIH staff (ver 2.1)

Description:

Allows an actor to select a project to work with.
(project is the term used to refer to a grant without regard to support year, and when used, would refer to all support years. Selecting a project allows an actor to view a list of trainees for that project.

Assumptions:

Grant exists in system. For PD or delegate, only grants/projects to which the program director is assigned are selectable. Only Grants with a major activity code of 'T' will be searchable/selectable.

2) View Training Roster

Actors:

Program Director, delegate, NIH staff(ver 2.1)

Description:

Allows an actor to view a list of trainees currently or previously assigned to the training grant for the purpose of amending an appointment or re-appointing a trainee to another support year. Actors can also create a new training appointment from this form.

3) Create New Trainee Appointment

Actors:

Program Director, delegate, NIH staff(ver 2.1)

Description:

Allows an actor to create a new trainee appointment.

Assumptions:

Trainee does not show up on the list of rosters. Trainee has not been previously appointed to this grant project (has not been appointed in previous support years).
System will check for matching profile in database on back end.
Email will be sent to trainee asking them to login and verify their profile. (ver 2.1)

4) Reappoint Trainee

Actors:

Program director, delegate, NIH (ver 2.1)

Description:

Allows an actor to reappoint a trainee to the selected support year of a training grant.

Assumptions:

Trainee has been assigned to a previous support year of the training grant.

5) Amend Trainee Appointment

Actors:

Program director, delegate, NIH (ver 2.1)

Description:

Allows an actor to update certain fields of a previously entered trainee appointment.

Assumptions:

Selected individual is currently assigned to the selected training grant.

6) Delegate Responsibility to Assistant.

Actors:

Program Director

Description:

Allows Actors to delegate appointment creation, submittal to another user.

Assumptions:

Delegate would have full authority as Program Director for this particular grant.
See Commons Delegate

7) Review Appointment (ver 2.1)

Actors:

NIH Staff

Description:

Allows NIH staff to do the following tasks:
a. Review appointment
b. Accept appointment
c. Reject appointment

8) Review Termination(ver 2.1)

Actors:

NIH Staff

Description

Allows an actor to do the following tasks:
a. Approve termination
b. Reject termination

9) Create Trainee Account (ver 2.1)

Actors:

Program Director and anyone else authorized to create accounts. (AO, SO?)

Description

Allows an actor to create an account for a trainee.
(See Commons Create Account use case)

Assumptions:

Program Director has authority to create accounts for trainee.
May need to add additional usertype of Program Director to make distinction from regular PI user, who currently does not have ability to create accounts.
a. Create trainee account
b. send email to trainee about username/password/ Commons URL.

Provide ability to autogenerate/print payback agreement forms for postdoc appointments.

10) Manage Terminations (ver 2.1)

Actors:

Program Director, Delegate, AO/SO

Description

Allows actors to do the following tasks:
a. Enter termination notice data
b. Submit electronic termination notice. (May only pertain to AO/SO

11) Display Appointment Summary

Actors:

Program Director, Delegate

Description

Allows actors to do the following tasks:
a. View appointment summary data for a trainee for the selected grant year.
b. Select previous year appointment summary data.
c. Select the amend or reappoint options. (see the Amend Trainee Use Case or the Reappoint Trainee Use Case.

12) Select Grant

Actors:

Program Director, Delegate

Description

Allows an actor to select a grant to work with when creating a new appointment or amendment. Selecting a grant allows an actor to work in the context of a specific support year (grant) when creating a new appointment, or amendment.